

Secret Patrons and Virtual Field Trips

Adventures in Training Library Staff for Virtual Reference

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Hundreds of libraries—academic, public, and special libraries—are now offering live virtual reference services (VRS), an exciting way to reach out to users in “real-time” through the Web. (You can see a directory of chat reference services maintained by Stephen Francoeur at <http://pages.prodigy.net/tab01/chatlibrarytypes.htm>).

For many years, libraries have been providing virtual collections of resources via their Web sites, and delivering reference services through e-mail and Web-based forms. These delivery methods are asynchronous, not done in real-time, and require that a user wait for the answer to a question.

Current innovations in virtual reference services are focused on real-time (synchronous) interactions between library staff and patrons, using software that incorporates chat communication along with the ability to guide a user through a Web search. These technologies represent a fundamental shift in library services—transforming library materials, resources, and personnel from building-based services to point-of-need services.

Although rooted in traditional reference services, effective virtual reference requires a new set of skills. The lack of visual or auditory cues in the chat interaction increases the possibility of miscommunication. Multitasking abilities and excellent control of the Windows desktop are essential for success with this new software. And with high user expectations about what can be found on the Web, library staff need search strategies for quick retrieval of accurate online sources.

For many of the staff providing or planning these new services, preparation has consisted mainly of training on software, provided by the software vendors themselves. The Fall 2002 supplement to **Library Journal**, called **netConnect**, contains an article by Buff Hirko on the vendors for VRS software. Few training programs identify and build on core competencies for virtual reference,

independent of the software used for delivery.

In June 2002, co-worker Daria Cal and I set out to create a training curriculum for the Washington State Virtual Reference Project, to be delivered to library staff all over the state. This training curriculum had to address a number of challenges.

- Varied types of libraries are participating in the statewide LSTA-funded project, including small public libraries in rural eastern Washington, large public libraries in urban areas, community college libraries, a law library, and university libraries.
- Staff have different levels of education and experience. Some have the MLS degree, others do not. Some have been providing VRS for a year or longer, others are still in the planning stages.
- The libraries involved in the project are using different software packages to deliver their services (LSSI, 24/7 Reference, OCLC Question Point, some “home-grown” software).

Beginning with the core competencies developed for the project, Daria and I designed Anytime, Anywhere Answers: Building Skills for Virtual Reference. Delivered via the Web, Anytime, Anywhere Answers includes face-to-face and virtual meetings, synchronous and asynchronous learning activities, and individual and collaborative experiences. It is “software-neutral,” intended to be relevant to staff using a variety of virtual reference delivery methods and software packages.

Our goals were to facilitate the acquisition of the core competencies, encourage best practices, support active learner participation, and create an ongoing learning community willing to share experiences with this new service. In addition, we wanted the learners to have fun, so we designed Secret Patron and Virtual Field Trip activities that examine the virtual reference experience from the user’s perspective.

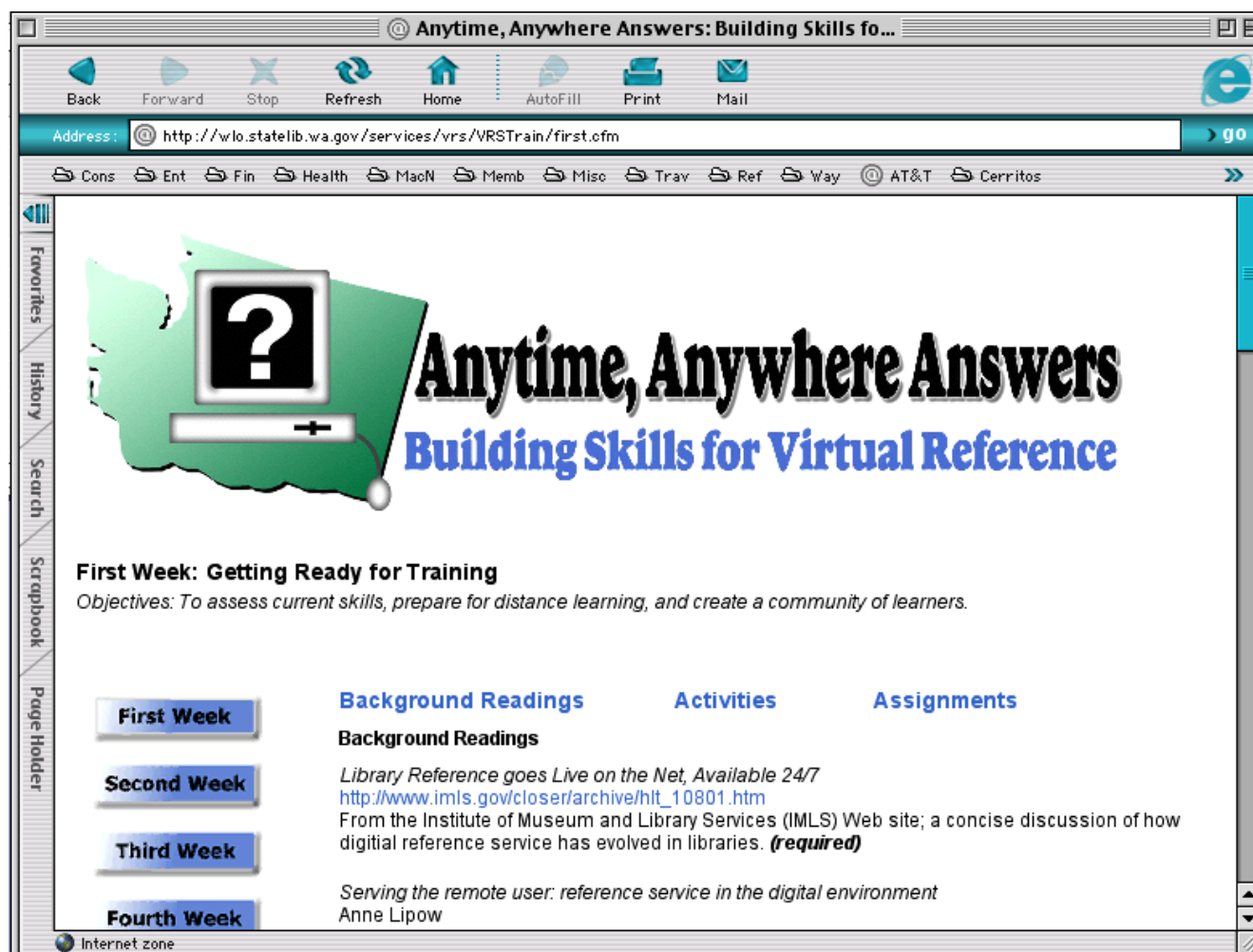
See Virtual Reference continued on page 7

We alerted those who are participating in the training that they would find the curriculum to be more learner-focused and less instructor-focused than they may have encountered in their previous training experiences. The training provides sets of resources, activities, and tasks, creating an environment in which library staff can actively explore, discover, and reflect on the skills needed for these new reference services. In this constructivist learning approach, the most powerful learning results from active participation, especially from the conclusions reached and experiences shared by both learners and trainers. We told the trainers that they should ask the right question rather than give the right answer!

Nancy Huling, president-elect of RUSA and one of our trainers, highlighted the potential value of this training for both experienced and beginning VRS staff. She

said: "During my shifts on our Q&A Live service this week, I found myself thinking through much of what we discussed (in the training): How was my reference interview? Did I really know what the user wanted? Was I asking the right questions? It was all right there at the back of my mind, so I'm proof that it works. I think the training will be excellent for those who are just getting started, as well as for those who've been doing it for a while."

Early in October we completed the train-the-trainer sessions for those who will facilitate this training statewide. The actual training began in November, with orientation sessions in Seattle and Spokane. Stay tuned for the next installment in the March issue of the CLENExchange, when I will report on the results of the training and the reactions of the learners!



If you wish to checkout the website, the password and URL can be obtained from the project coordinator, Buff Hirko. Her e-mail address is bhirko@secstate.wa.gov and phone number is 360-704-5206.